

Chapter 1 - General Information

How to Get Help

First:

Determine which area you are having problems with. Refer to the section of the manual that relates to the function you are trying to perform.

Second:

Email the Probate/Juvenile Help Desk. Email is checked several times a day and you should receive a response the same day if we are in the office.

PCSHHELPDESK@COURTS.MI.GOV

Third:

Call the Probate/Juvenile Help Desk. The court rep's are available to assist you with your problems, questions and concerns.

1-888-339-1547

In addition, the user always has access to the following management personnel:

Mr. Marcus F. Dobek
Director
Judicial Information Systems
309 N. Washington Square
P.O. Box 30048
Lansing, MI 48909
(888)339-1547 or (800)572-1116

NOTE: If you are having a Windows problem or are unable to get connected to the AS400 from your PC, you need to contact your Data Processing/Information Systems personnel.

Accessing the Adoption System

Sign on Procedure:

Before you can access the Juvenile System, you will need to be assigned a user ID. Your user ID identifies you to the computer as an authorized user of the Probate System. You will also need a password which protects your user ID from unauthorized use. You will be able to select your own password, choose something that will be easy for you to remember. Both the user ID and password are required for a successful sign on.

If you are not already signed on, your workstation will display the screen shown below. Enter your user ID in the **User** field, it will be displayed as you type. Enter your password in the **Password** field. For security reasons, this field will not be displayed as you type. The remaining fields (if any) are left blank.

```

      Sign On
Michigan Supreme Court      System . . . . . : OSMSOUTH
State Court Administrative Office  Subsystem . . . . . : QINTER
Judicial Information Systems    Display . . . . . : SMELTAB

User . . . . . _____
Password . . . . .

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If an error message appears, verify your user ID and password and re-enter them.

Pressing <F3> from the Probate or Juvenile Transaction Request Screen will return you to this screen. You should return to this screen at the end of each day before shutting your computer off.

Standard Function Keys

- <F1> This key is used to get help on the area that your cursor is placed. A window will appear on your screen giving you help information for that area.
- <F2> This key is used to position your cursor on the next tran line.
- <F3> This key is used to cancel any entry that you have made on a screen before you have pressed <Enter> or it is used to exit from any screen.
- <F4> This key is used to prompt on a field for a list of all valid entries for that field.
- <F5> This key is used from the Transaction Request Screen when setting up the system.
- <F6> This key is used to go to the Command Selection Menu to work with printer and security issues.
- <F8> This key is sued to switch from processing Juvenile cases to processing Probate cases.
- <F9> This key is used to look up names in the system.
- <F10> This key is used to process information in the Financial system and it is also used on the Transaction Request Screen for looking up cases for attorneys.

NOTE: This is not a complete list of function keys, each section that has special processing for a certain function key will be explained in that section. This is a list of standard function keys.

Name Entry Rules

All name fields in the system are entered according to the following rules:

1. The names should be entered as **Last, First, Middle, Suffix** where:
Last = Last Name
First = First Name
Middle = Middle Name
Suffix = Jr - Junior, Sr-Senior, I, II, III, etc.
2. The name must include a minimum of two commas or slashes, even if the first name is omitted. A company name must be followed by two commas or slashes.
3. Valid characters are any letter A-Z, any number 0-9, and the following special characters :-,&().
4. The first character of the name cannot contain a special character.

Following are examples of name entries:

Regular Names

Jones,Robert,
Jones,Robert,M,

Names with suffixes

Jones,Robert,M,Sr
Jones,Robert,M,III

Names with special characters

O'Brien,Patrick,M
Van Horn,Michael,
D & D Supply,,

Company Names

Allstate Insurance Company,,
Michigan Supreme Court,,

F4 - Field Prompts

Field prompts are available on fields that can have multiple entries. <F4> is the prompt key. <F4> is pressed from a field that allows prompting. The system will return a list of valid codes that can be used for the field you prompted from. The following example shows the prompt list.

The screenshot shows a window titled 'B' with a 'CODE TABLE' for adoption types. The table is as follows:

Code	Description
AB	ADULT ADOPTIONS
AC	AGENCY INTERNATIONAL ADOPTIONS
AM	AGENCY MCI ADOPTIONS
AO	AGENCY OTHER ADOPTIONS
AD	DIRECT PLACEMENT ADOPTIONS
AN	NON-RELATIVE GUARDIAN ADOPTIONS
AF	RELATIVE ADOPTIONS
RL	RELEASE TO ADOPT, NA CASE
RB	RELEASE TO ADOPT, NO CASE

Below the table, it says 'More...' and 'F3=Exit F6=System F11=More Codes'. The window also has various input fields for case details and a footer with system information.

Codes will be displayed in a separate window. there is a "Position to" field that can be used to search for a particular code/description.

By entering an "X" to the left of the code that you want to select and pressing <Enter>, the system will insert that code into the field you prompted from.

If you do not want to make a selection, press <F3> and the system will return you to the screen you prompted from.

F1 - Help

On screen help is available for a specific field or the entire screen that you are on. If <F1> is pressed on a field or screen, the system will show a pop up screen with information about the field/screen you requested help for.

Use <Page Up> and <Page Down> keys to scroll through the information.

Following is an example of field specific help.

USER: J44ANGIE TRANSACTION REQUEST SCREEN RELEASE: 05/2003

Juvenile Transactions	Receivable Transactions	Vendor Transactions
CSE - Case	ARM - Master Inquire	AP0 - Other Vendor Maint.
PET - Petition	ARU - Master Maintenance	APA - Attny Vendor Maint.
PTY - Part		
EVT - Even		
IDX - Inde		
ACK - Ackn		
TRF - Traf		
INT - Inta		
DOC - Docu		
SUM - Summ		
FRD - Fina		

Rep

RPT/JUV -
RPT/FIN -
RPT/ADP -

Online Help

NEXT MASK:

This is a code that represents which function is to be processed.

F3=Exit F2=Extended Help F6=System F16=Inv.Cal

NXT TRAN

F3=Exit F5=Setup F6=System Commands F8=Probate F9=Name Lookup
F10=Attorney F14=Docket Request F16=Inv/Date F20=File Maintenance

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<F1> was pressed on the Next Tran Type field. The above screen shows the help text for that field. If extended help is needed, press <F2>. The system will return the following screen. Press <F3> to exit.

USER: J44ANGIE TRANSACTION REQUEST SCREEN RELEASE: 05/2003

Juvenile Transactions	Receivable Transactions	Vendor Transactions
CSE - Case	ARM - Master Inquire	AP0 - Other Vendor Maint.
PET - Petition	ARU - Master Maintenance	APA - Attny Vendor Maint.
PTY - Part		
EVT - Even		
IDX - Inde		
ACK - Ackn		
TRF - Traf		
INT - Inta		
DOC - Docu		
SUM - Summ		
FRD - Fina		

Rep

RPT/JUV -
RPT/FIN -
RPT/ADP -

Online Help

CRTPFX Court prefix

Three options are available on this display. They are:

J = Juvenile Court

P = Probate Court

More...

F3=Exit F6=System F12=Cancel Extended Help F16=Inv.Cal

NXT TRAN

F3=Exit F5=Setup F6=System Commands F8=Probate F9=Name Lookup
F10=Attorney F14=Docket Request F16=Inv/Date F20=File Maintenance

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Transaction Request Screen

The initial screen you will see is the Transaction Request Screen. Depending on the level of security that you have will determine which functions you see on your transaction request screen.

Following is an example of a Transaction Request Screen.

The screenshot displays the 'TRANSACTION REQUEST SCREEN' for user 'J44ANGIE' on '05/2003'. The screen is organized into several sections:

- Juvenile Transactions:** CSE - Case, PET - Petition, PTY - Party, EVT - Event, IDX - Index, ACK - Acknowledgment, TRF - Traffic, INT - Intake, DOC - Document, SUM - Summary, FRD - Financial Order.
- Reports:** RPT/JUV - Juvenile, RPT/FIN - Financial, RPT/ADP - Adoption.
- Receivable Transactions:** ARM - Master Inquire, ARU - Master Maintenance, CHK - Master Payment Inq, LUP - Receipt Inquiry/Void, ARP - Receive Payments, ADJ - Adjustment, CRM - Credit Memo, FST - Financial Statement, DSS - FIA 207 Setup, RST - Restitution Process.
- Adoption Transactions:** ADC - Adoption Case Header, ADP - Adoption Party, ADE - Adoption Event, ADS - Adoption Case Summary, ADF - Adoption Forms.
- Vendor Transactions:** APO - Other Vendor Maint., APA - Attny Vendor Maint., APF - Facil Vendor Maint., APV - Voucher Processing, API - Voucher Inquiry, APP - Voucher Payments, APJ - Voucher Adjustments.
- Accounting Transactions:** ACT - Account Maintenance, BMT - Budget Maintenance, BIQ - Budget Inquiry, PRM - Price File Maint.
- Other Options:** REL - Release Information, CNI - Central Name Index, CPI - Cir/Pro Name Index, CCL - Central Calendar.

At the bottom, there are fields for 'NXT TRAN', 'TYPE', 'CASE NBR' (03334816), 'PET' (00000000), 'EVT', and 'PTY'. Below these are function keys: F3=Exit, F5=Setup, F6=System Commands, F8=Probate, F9=Name Lookup, F10=Attorney, F14=Docket Request, F16=Inv/Date, F20=File Maintenance, and a 'Help' button.

The status bar at the bottom indicates 'Connected to remote server/host OSMSOUTH using port 23' and '21/013'.

In the upper left corner is your user id. This will tell you who is signed on at the machine.

In the upper right hand corner is the release date. This will tell you the date of the last software release that was installed on the AS400.

The functions which may be performed are grouped by the type of transaction.

~Probate~

The probate transactions, excluding financial orders, allow you to enter data, perform inquiries and produce forms. Refer to the JIS Probate System Manual for information on these transactions.

~Juvenile~

The juvenile transactions allow you to enter data, perform inquiries and produce forms. Refer to the specific chapter in this manual for information on these transactions.

~Adoption~

The adoption transactions allow you to enter data, do inquiries and produce forms. Refer to the JIS Adoption Manual for information on these transactions.

~Financial~

The financial transactions consist of Accounts Receivable and Accounts Payable. Refer to the JIS Financial System manual for information on these transactions.

~Reports~

The report transactions allow you to run reports that will provide information on the data that exists in the system. Refer to the individual system manuals for details on reports.

~Other~

The other transactions include release information and cross application transactions. These items will be discussed in all JIS manuals.

Next Tran Line:

The next tran line is available on most every screen in the system. This line is used to take you from screen to screen throughout the system. Following is an example of the next tran line.

NXT	TRAN	___	TYPE	___	CASE	NBR	00000000	___	PET	00000000	EVT	___	PTY	___
-----	------	-----	------	-----	------	-----	----------	-----	-----	----------	-----	-----	-----	-----

~Next Tran Field~

The next tran field is the transaction that you want to perform. Following are possible choices for Juvenile:

CSE	-	Case
PET	-	Petition
PTY	-	Party
EVT	-	Event
TRF	-	Traffic
INT	-	Intake
DOC	-	Document Summary
SUM	-	Summary

~Type~

The type field is the type of transaction that you want to perform. Following are possible choices:

ADD	-	Add
INQ	-	Inquiry
MOD	-	Modify
DEL	-	Delete
SUM	-	Summary

The remaining fields hold the case number, suffix number, petition number, event number and party number.

Function Keys

<F1> Help

<F3> Exit

<F5> JIS system setup. The set up screen is discussed later in this chapter.

<F6> System commands. System commands allow you to work with printers and security.

<F8> Toggle between probate system and juvenile system.

<F9> Name Lookup

<F10> Attorney case lookup

<F14> Docket Request

<F16> Inventory/Fee Calculator

<F20> File maintenance

JIS Adoption Court System Setup

The setup screen is accessed by pressing <F5> from the Transaction Request Screen.

JIS PROBATE COURT SYSTEM SETUP
Juvenile
Enter your primary system > P P=Probate J=Juvenile
C=Civil

-Juvenile-

STARTING NUMBERS Next Case Number >
Next Petition Number >
Next Intake Number >
Receipt Number >
A/R Adjustment Number >
A/P Voucher Number >
Next Adoption Case Number >

FINANCIAL OPTIONS Print name on voucher for others . . >
Print name on voucher for attorneys . >
Print name on voucher for facility . . >
Check budget record for vouchering . >
Check DSS207 file for vouchering . . >
Reprint voucher after payments . . . >
Allow temporary payments >
Restitution Tracking >

F3=Exit

PASSWORD REQUIRED
FOR THESE OPTIONS

Help

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Enter your three character password and press <Enter>. The system will to open these fields. Your security level will determine the amount of fields that will open.

JIS PROBATE COURT SYSTEM SETUP
Juvenile
Enter your primary system > P P=Probate J=Juvenile
C=Civil

-Juvenile-

STARTING NUMBERS Next Case Number > 000000
Next Petition Number > 000000
Next Intake Number > 000000
Receipt Number > 45691
A/R Adjustment Number > 90000950
A/P Voucher Number > 11811
Next Adoption Case Number > 000000

FINANCIAL OPTIONS Print name on voucher for others . . > Y
Print name on voucher for attorneys . > Y
Print name on voucher for facility . . > Y
Check budget record for vouchering . > Y
Check DSS207 file for vouchering . . > N
Reprint voucher after payments . . . > Y
Allow temporary payments > N
Restitution Tracking > Y

F3=Exit F14=Delinquent Letter

Help

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Following are field descriptions for the above fields.

~Next Case Number~

If automatic case numbering is being used, this field will hold the next available case number.

~Next Petition Number~

If automatic petition numbering is being used, this field will hold the next available petition number.

~Next Intake Number~

If automatic numbering is being used, this field will hold the next available intake number.

~Receipt Number~

This field displays the next receipt number that the system will use.

~A/R Adjustment Number~

This field will display the next adjustment number that the system will use.

~A/P Voucher Number~

This field will display the next voucher number that the system will use.

~Next Adoption Case Number~

If automatic case numbering is being used, this field will display the next available adoption number.

~Print Name on Vouchers for Others~

This field is used to either print the name on the vouchers when “Other Vendor Vouchers” are created or not. The valid entries are Y-Yes and N-No.

~Print Name on Vouchers for Attorneys~

This field is used to either print the name on the vouchers when “Attorney Vendor Vouchers” are created or not. The valid entries are Y-Yes and N-No.

~Print Name on Vouchers for Facilities~

This field is used to either print the name on the vouchers when “Facility Vendor Vouchers” are created or not. The valid entries are Y-Yes and N-No.

~Check budget record for vouchering~

This field is used if the budget has been set up in the BMT - Budget Maintenance screen. It will check the budget when you create a voucher to make sure that money is available in that account.

~Check DSS207 file for vouchering~

It will check the DSS 207 records when creating a voucher to be sure that the correct days code is used.

~Reprint voucher after payments~

This will re-print the voucher when a payment is applied to it.

~Restitution Tracking~

This field is used to turn restitution tracking on and off. This is only a Juvenile function.

Delinquency Letter

The delinquency letter is used to inform parties that they are delinquent in paying on their accounts. There is a separate letter for juveniles and for their parents. By pressing <F14> from the JIS setup screen, the system will display the "Parents Letter". All text that displays on the screen can be modified.

Once any modifications have been made, you must press <F10> to update the letter. Both parents and the juvenile delinquent letter need to be updated after changes are made.

Following is an example of the delinquent letter.

PLEASE BE ADVISED THAT BY FAILING TO MAKE THE PAYMENTS AS ORDERED, YOU WILL BE SUBJECT TO A CONTEMPT OF COURT CHARGE. THIS MAY BE PUNISHABLE BY AN ASSIGNMENT OF WAGES AND/OR PLACEMENT IN THE COUNTY JAIL.

YOU MAY AVOID THESE UNPLEASANT CIRCUMSTANCES BY MAKING ARRANGEMENTS WITH THIS COURT WITHIN 15 DAYS TO PAY THE ARREARAGE AND THEN THEREAFTER MAKING PAYMENTS AS ORDERED UNTIL THE BALANCE IS PAID IN FULL.

FAILURE TO DO SO WILL RESULT IN CONTEMPT OF COURT PROCEEDINGS, AND AT THESE PROCEEDINGS OTHER CHARGES MAY BE ORDERED.

IT IS NOT THE COURT'S DESIRE TO PURSUE THE CONTEMPT OF COURT CHARGE, AND WITH YOUR COOPERATION IT WILL NOT BE NECESSARY.

Automatic Generation of Case Numbers

Automatic generation of case numbers must be set up in the JIS juvenile system setup.

1. From the Transaction Request Screen, press <F5> and the system will return the following screen.

```

JIS PROBATE COURT SYSTEM SETUP
Juvenile
Enter your primary system . . . . . > P P=Probate J=Juvenile
                                         C=Civil

                                -Juvenile-
STARTING  Next Case Number . . . . . >
NUMBERS   Next Petition Number . . . . . >
          Next Intake Number . . . . . >
          Receipt Number . . . . . >
          A/R Adjustment Number . . . . . >
          A/P Voucher Number . . . . . >
          Next Adoption Case Number . . . . . >

FINANCIAL Print name on voucher for others . . >
OPTIONS   Print name on voucher for attorneys . . >
          Print name on voucher for facility . . >
          Check budget record for vouchering . . >
          Check DSS207 file for vouchering . . >
          Reprint voucher after payments . . . >
          Allow temporary payments . . . . . >
          Restitution Tracking . . . . . >

F3=Exit

                                PASSWORD REQUIRED
                                FOR THESE OPTIONS

                                Help

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2. Enter your three character password and press <Enter>. The system will display the following screen.

JIS PROBATE COURT SYSTEM SETUP

Juvenile

Enter your primary system > P P=Probate J=Juvenile
C=Civil

-Juvenile-

STARTING	Next Case Number	> <u>000000</u>
NUMBERS	Next Petition Number	> <u>000000</u>
	Next Intake Number	> <u>000000</u>
	Receipt Number	> 45691
	A/R Adjustment Number	> 90000950
	A/P Voucher Number	> 11811
	Next Adoption Case Number	> <u>000000</u>

FINANCIAL	Print name on voucher for others . .	> <u>Y</u>
OPTIONS	Print name on voucher for attorneys .	> <u>Y</u>
	Print name on voucher for facility . .	> <u>Y</u>
	Check budget record for vouchering .	> <u>Y</u>
	Check DSS207 file for vouchering . .	> <u>N</u>
	Reprint voucher after payments . . .	> <u>Y</u>
	Allow temporary payments	> <u>N</u>
	Restitution Tracking	> <u>Y</u>

F3=Exit F14=Delinquent Letter

Help

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3. Enter the case number that you want the system to start generating from and press <Enter>.
4. Press <F3> to exit.

Entering a Case Using Automatic Case Numbering

Enter the following on the Next Tran Line:

NXT	TRAN	<u>ADC</u>	TYPE	<u>ADD</u>	CASE NBR	<u>00000000</u>	___	PET	<u>00000000</u>	EVT	___	PTY	___
-----	------	------------	------	------------	----------	-----------------	-----	-----	-----------------	-----	-----	-----	-----

1. Enter ADC/ADD.
2. Leave the case number field blank.
3. Enter the suffix number for the case you are creating.
4. Press <Enter>. The system will display the case add screen.

NOTE: Only one person can be in a case ADD screen at a time when using automatic case numbering.

Inventory/Date Calculator

The Inventory/Date calculator is used for two purposes.

1. To calculate a Inventory Fee
2. To calculate dates.

This function can be accessed from most any screen throughout the Probate system by pressing <F16>.

Inventory Fee Calculations:

1. Press <F16> and the system will display the following screen.

USER: J44ANGIE TRANSACTION REQUEST SCREEN RELEASE: 05/2003

INVENTORY / DATE CALCULATOR

Inventory Calculation	Date Calculation
Enter amount of inventory: 157500.00	Enter start date (MMDDYYYY): _____
Inventory fee due: _____	Enter # days to add/subtract: + 91
	Ending date is: _____

F3=Exit

NXT
F3=E
F10=Attorney F14=Docket Request F16=Inv/Date F20=File Maintenance Help

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2. Enter the total value of the inventory and press <Enter>. The system will display the following screen.

USER: J44RANGIE TRANSACTION REQUEST SCREEN RELEASE: 05/2003

INVENTORY / DATE CALCULATOR

Inventory Calculation	Date Calculation
Enter amount of inventory: 157500.00	Enter start date (MMDDYYYY): _____
Inventory fee due: 434.38	Enter # days to add/subtract: + 91
	Ending date is: _____

F3=Exit

NXT
F3=E
F10=Attorney F14=Docket Request F16=Inv/Date F20=File Maintenance Help

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Displayed on the screen is the amount of the Inventory Fee that is due on the amount you entered.

Date Calculator:

1. Press <F16> and the system will display the following screen.

USER: J44ANGIE TRANSACTION REQUEST SCREEN RELEASE: 05/2003

INVENTORY / DATE CALCULATOR

Inventory Calculation	Date Calculation
Enter amount of inventory:	Enter start date (MMDDYYYY):
	01012003
Inventory fee due:	Enter # days to add/subtract:
	+ 91
	Ending date is:

F3=Exit

NXT
F3=E
F10=Attorney F14=Docket Request F16=Inv/Date F20=File Maintenance Help

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2. Enter the date that you want to calculate from and the amount of days to calculate along with the plus/minus and press <Enter>. The system will display the following screen.

USER: J44ANGIE TRANSACTION REQUEST SCREEN RELEASE: 05/2003

INVENTORY / DATE CALCULATOR

Inventory Calculation	Date Calculation
Enter amount of inventory:	Enter start date (MMDDYYYY):
<u> </u>	<u>1012003</u>
Inventory fee due:	Enter # days to add/subtract:
<u> 5.00 </u>	<u>+</u> <u>91</u>
	Ending date is:
	APRIL 02, 2003
	WEDNESDAY

F3=Exit

F10=Attorney F14=Docket Request F16=Inv/Date F20=File Maintenance

Help

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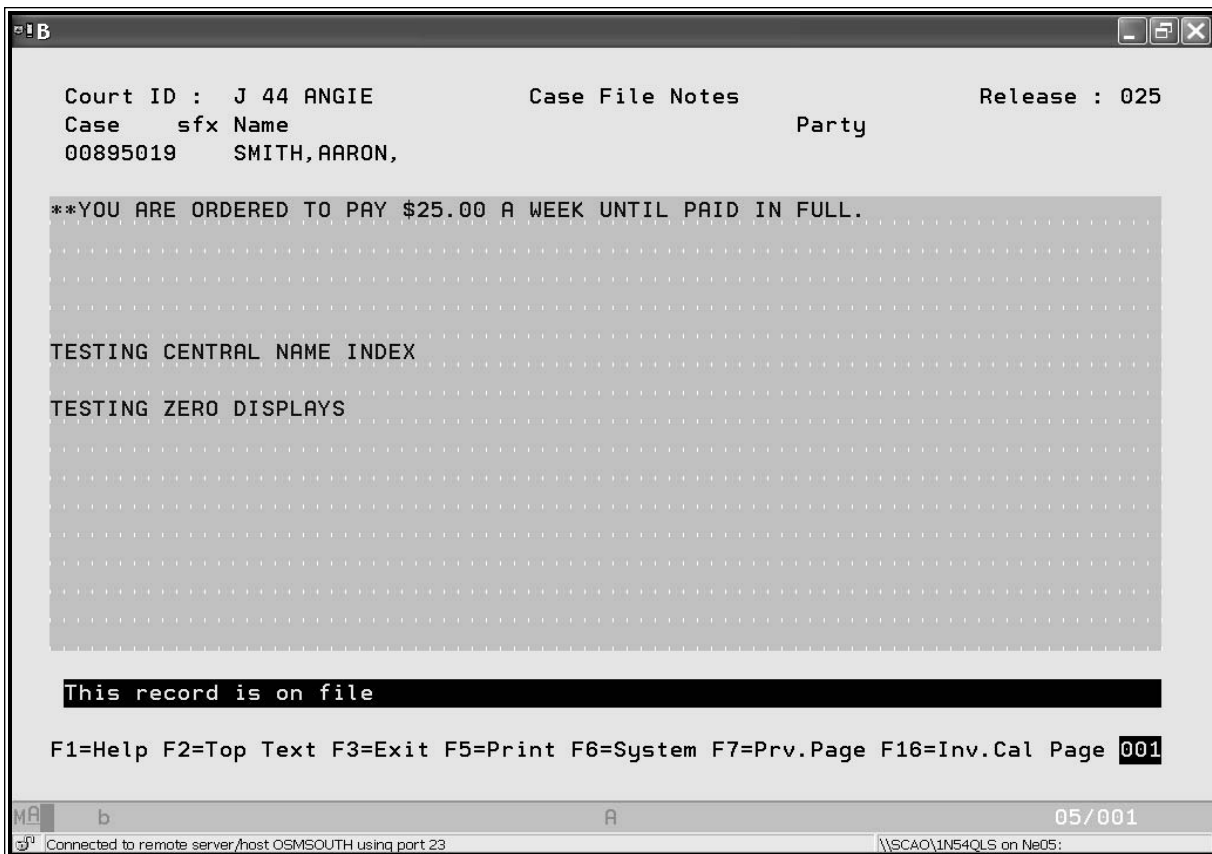
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Displayed on the screen is the date that was calculated.

Notes - F13

The Notes program is used to enter information regarding the case or a party on the case. By pressing <F13> from any screen, the system will display the notes screen.

NOTE: The notes screen is party specific. You must enter the party number on the Next Tran Line and press <Enter> before pressing <F13>.



Instructions for using the notes screen.

1. The first four lines are used to print special instructions on the bills. Only use the first four lines if you have special instructions that you want printed on the persons bill.
2. Any previous notes that have been entered will appear after the first four lines.
3. Use the <Page Up> and <Page Down> keys for scrolling through the notes.